



Organizational Assessment

This survey is to assist you in identifying the level of development of your organization in several key areas.

	Do you have this in place for your organization?	
	YES	NO
Board Development		
• A functioning Board of Directors		
• Regular Board meetings		
• Regular communications between the Board and the Executive Director		
• Updated by laws		
• Strategic plan for the Board and the organization		
• A Board that raises money for the organization		
• Member training on financial oversight		
• Member training on conflict resolution		
Vision and Mission		
• A clear vision statement		
• A clear mission statement		
• A vision and mission that is shared with other stakeholders		
Cultural and Linguistic Competence		
• Staff and Board representing the cultures served by the organization		
• A policy and procedure for diversifying the staff, Board and volunteers in the organization		
• Materials and resources that are written in a languages the target population can understand		
Consumer Peer Representation		
• Strategies to outreach to emerging consumer leaders		
• Strategies to engage consumers and peers in under represented communities		
• Strategies and policies to include other stakeholders and peers in organizational direction		
• Strategies to train and support emerging leaders		
Program Development		
• Written organizational policies and procedures		
• Training for volunteers		
• Written description of each project and program within the organization		
• Strategic plan for supporting the future of programs and projects		

Financial Management		
• Generally accepted program for financial management (such as Excel, QuickBooks)		
• Written policies and procedures for financial management		
• Training on travel and reimbursement policies		
• Schedule of grant required reports		
• Annual operating budget		
• Procedures for sharing the budget and policies with Board		
• Process for monitoring the budget throughout the year		
• Procedures for financial reimbursement from insurance and Medicaid sources		
Human Resource Accountability		
• Adequate number of employees to accomplish organizational goals		
• Personnel policies and procedures		
• Reasonable accommodations		
• Staff training and development		
• Staff recruitment and retention plans		
Program Evaluation		
• Process for collecting data on organizational activities and contacts		
• A process to collect and store data		
• A plan to incorporate evaluation outcomes into the organizations quality improvement (QI)		
• A plan to report data to stakeholders and peers		
Sustainability		
• A fund development plan for raising revenue to support activities		
• Unrestricted dollars		
• A set (and accepted) administrative overhead rate		
• A plan for diversifying funds		
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Infrastructure		
• Adequate office space		
• Insurance – liability and otherwise		
• Furniture and Related Equipment		
• Information Technology		